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SALES SURVEY OF THE SOFT DRINK INDUSTRY NSDA 1981

Foreword

1981 National Summary

Regional Analyses

Estimated Annual Production and Consumption of Soft Drinks—1849–1981

Glossary

FOREWORD

Each year the National Soft Drink Association presents this review of the industry's sales performance based on a survey of Association members and other soft drink manufacturers eligible for membership in NSDA. In 1981, 284 plants participated by providing information on beverage production in finished drink and syrup form for the years 1980 and 1981. These responses were then tabulated to provide calculations necessary to estimate regional and national sales patterns.

This estimate of annual growth is reconciled with the U.S. Department of Commerce's 1977 Census of Manufactures. Bottle and can shipments, sugar usage, crown shipments, and information on performance of public companies also contribute to the final figures.

The survey shows growth in terms of units and converted units. The increases for converted units reflect increases in gallonage consumed. Converted units are composed of 288-ounce cases, or twenty-four 12-ounce containers. Sales of bulk products are reported on a finished drink basis.

In 1977, the 12-ounce container was adopted as the standard sampling size of the average container for use in this survey. Figures for years prior to 1977 have been changed to correspond with this standard.

Results in some instances do not correspond precisely to other available information about trends and patterns of the soft drink industry. Such results may occur because of sampling distortions related to the number of respondents and the product definitions.

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1981 NATIONAL SUMMARY

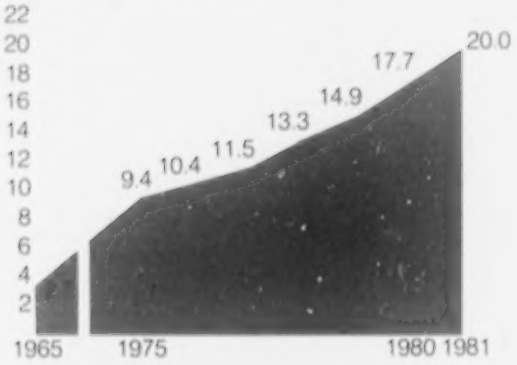
Plants Reporting: 284

TOTAL SALES

Gallonage	+3.8%
Packaged	+3.9%
Bulk	+2.8%
Units	+2.6%
Dollar Value	+13.2%

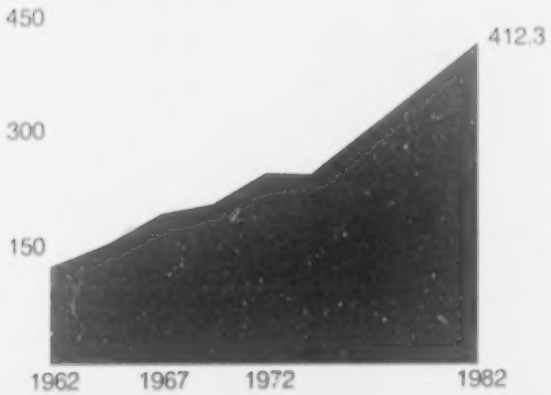
NATIONAL SALES

$ Value in Billions—Wholesale Value



PER CAPITA CONSUMPTION

in 12 oz. units



Total Sales

Soft drink sales and consumption increased in 1981 at rates similar to those experienced by the industry in 1980. Total gallonage (bulk and packaged) grew at a 3.8% rate, with packaged at 3.9% and bulk at 2.8%. Unit sales rose by 2.6%. Total dollar value increased 13.2% during 1981.

Total sales of 3,959,697,000 cases (288 ounces) of standardized units represented a wholesale value estimated at $20 billion. Per capita consumption advanced to 412.3 12-ounce units.

MARKET SHARE BY PACKAGING TYPE

PACKAGING
Market Shares

Bulk packaging now accounts for 22.4% of the national market with packaged sales holding 77.6%.

Post-mix accounted for 84.6% and pre-mix, 15.4% of the bulk sales.

In packaged sales, the market share for cans was 36.0%; refillable glass, 29.0%; plastics, 19.9%; and one-way glass, 15.1%.

BULK

Market shares for one-way glass:

6-9 oz.	1.0%
10-12 oz.	29.0%
16 oz.	57.0%
24-32 oz./1 liter	6.0%
48-64 oz./2 liter	7.0%

Market shares for refillable glass:

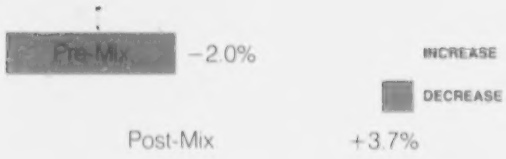
6-9 oz.	3.0%
10-12 oz.	17.0%
16 oz.	59.0%
24-32 oz./1 liter	20.0%
48-64 oz./2 liter	1.0%

PACKAGED

CONTAINER SALES

Percent of change

BULK SALES +2.8%



PACKAGED SALES +3.9%

SALES

Bulk sales were up 2.8% in 1981 with pre-mix decreasing 2.0% and post-mix increasing 3.7%.

Packaged sales were up 3.9% led by plastic at 15.9%. One-way glass increased 11.0% and can sales were up 0.08%. Refillable glass decreased 1.5%.

Among glass packages, the one-way 16-ounce bottle increased 40.5% and the refillable 16-ounce grew at a 7.4% rate. All other categories were off from the previous year.

GLASS CONTAINER SALES FROM PREVIOUS YEAR

GLASS CONTAINER SIZE	ONE WAY	REFILLABLE
6-9 oz.	−18.2%	−15.5%
10-12 oz.	−2.0%	−10.8%
16 oz.	+40.5%	+7.4%
24-32 oz./1 liter	−45.7%	−13.0%
48-64 oz./2 liter	−8.1%	−3.2%

MARKET SHARES BY FLAVOR

FLAVOR MIX

Flavor Mix

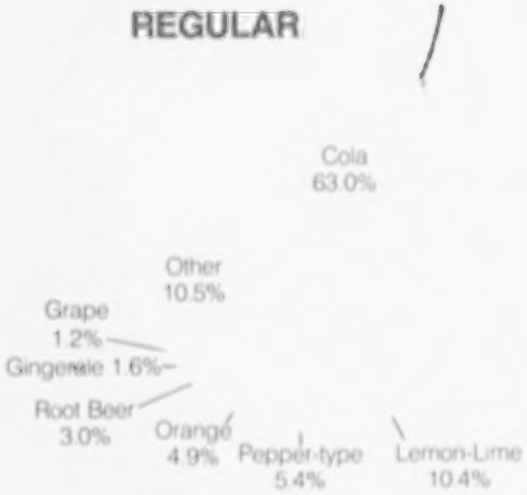
(Figures for individual flavors are subject to sampling distortions.)

Regular soft drinks accounted for 85.0% of packaged sales, with diet increasing in 1981 to 15.0%.

In the regular category, cola held a 63.0% share; lemon-lime, 10.4%; pepper-type 5.4%; and orange, 4.9%.

In the diet category, cola held a 65.3% share, and lemon-lime, a 13.3% share.

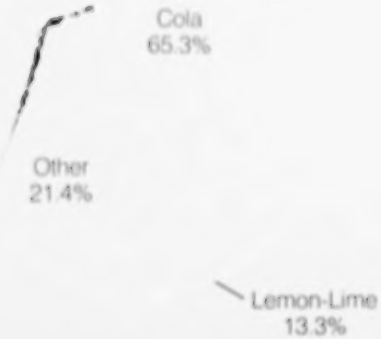
REGULAR



Distribution

Soft drink sales in food stores accounted for 59.4% of packaged volume, vending machines for 16.4%, and other retail outlets for 24.2%.

DIET



DISTRIBUTION

REGIONAL ANALYSES

Northeastern Region

Plants Reporting—41

Connecticut
Delaware
District of Columbia
Maine
Maryland
Massachusetts
New Hampshire
New Jersey
New York
Pennsylvania
Rhode Island
Vermont

Southern Region

Plants Reporting—80

Alabama
Arkansas
Florida
Georgia
Louisiana
Mississippi
North Carolina
South Carolina
Tennessee
Virginia

East Central Region

Plants Reporting—46

Illinois
Indiana
Kentucky
Michigan
Ohio
West Virginia
Wisconsin

Western Region

Plants Reporting—15

Colorado
Idaho
Montana
Nevada
Utah
Wyoming

Southwestern Region

Plants Reporting—30

Arizona
New Mexico
Oklahoma
Texas

West Central Region

Plants Reporting—49

Iowa
Kansas
Minnesota
Missouri
Nebraska
North Dakota
South Dakota

Pacific Region

Plants Reporting—23

Alaska
California
Hawaii
Oregon
Washington

NORTHEASTERN REGION

Plants Reporting: 41

Connecticut
Delaware
District of Columbia
Maine
Maryland
Massachusetts
New Hampshire
New Jersey
New York
Pennsylvania
Rhode Island
Vermont

SALES FROM PREVIOUS YEAR

Gallonage +5.2%

Units +4.0%

Bulk +2.1%

Packaged +5.3%

Dollar Value +9.6%

Package Type

Pre-Mix	−6.3%
Post-Mix	+6.6%
Plastic	+20.9%
Cans	+1.5%
Refillable Glass	+.02%
One-Way Glass	−10.5%

GLASS CONTAINER SIZE	ONE-WAY	REFILLABLE
6-9 oz	−10.1%	−22.0%
10-12 oz	−11.6%	−9.7%
16 oz	+17.9%	+0.9%
24-32 oz /1 liter	−75.7%	+25.7%
48-64 oz /2 liter	−19.3%	−31.1%

MARKET SHARES

PACKAGED: 96.9%

—BULK: 3.1%

BULK

Pre-Mix 32.0%

Post-Mix 68.0%

PACKAGED

Plastic 35.1%

One-Ways 13.7%

Refillables 9.7%

Cans 41.5%

ONE-WAY GLASS

16 oz. 70.6%

24-32 oz /1 liter 6.2%

48-64 oz /2 liter 0.7%

10-12 oz 19.0%

6-9 oz 3.5%

REFILLABLE GLASS

24-32 oz /1 liter 15.0%

16 oz 65.4%

48-64 oz /2 liter 2.4%

10-12 oz 13.4%

6-9 oz 3.8%

DISTRIBUTION

Food Stores 57.6%

Other Retail Outlets 26.7%

Vending Machines 15.7%

FLAVOR MIX FOR PACKAGED

(Figures for individual flavors are subject to sampling distortions.)

REGULAR SOFT DRINKS 81.0%	
Cola	64.6%
Lemon-Lime	9.0%
Orange	8.4%
DIET SOFT DRINKS 19.0%	
Cola	65.8%
Lemon-Lime	12.3%

SOUTHERN REGION

Plants Reporting: 80

Alabama
Arkansas
Florida
Georgia
Louisiana
Mississippi
North Carolina
South Carolina
Tennessee
Virginia

SALES FROM PREVIOUS YEAR

Gallonage +3.2%

Units +1.8%

Bulk +2.5%

Packaged +3.3%

Dollar Value +14.6%

Package Type

Pre-Mix	-4.9%
Post-Mix	+3.8%
Plastic	+14.2%
Cans	-3.5%
Refillable Glass	-0.9%
One-Way Glass	+10.1%

GLASS CONTAINER SIZE	ONE-WAY	REFILLABLE
6-9 oz	*	-13.6%
10-12 oz	+2.3%	-8.8%
16 oz	+32.5%	+19.8%
24-32 oz. 1 liter	-20.2%	-12.1%
48-64 oz. 2 liter	-5.6%	+32.2%

MARKET SHARES

PACKAGED 86.9%

BULK 13.1%

BULK

Pre-Mix 13.5%

Post-Mix 86.5%

PACKAGED

Plastic 20.0%

One-Ways 21.0%

Cans 25.7%

Refillables 33.3%

ONE-WAY GLASS

10-12 oz 41.0%

24-32 oz. 1 liter 4.9%

48-64 oz. 2 liter 12.1%

16 oz 42.0%

6-9 oz .01%

REFILLABLE GLASS

24-32 oz. 1 liter 26.6%

48-64 oz. 2 liter 1.5%

16 oz 37.2%

6-9 oz 7.2%

10-12 oz 27.5%

DISTRIBUTION

Food Stores 58.1%

Other Retail Outlets 22.2%

Vending Machines 19.7%

FLAVOR MIX FOR PACKAGED

(Figures for individual flavors are subject to sampling distortions.)

REGULAR SOFT DRINKS	86.8%
Cola	89.2%
Lemon-Lime	10.2%
Pepper-type	5.3%
DIET SOFT DRINKS	10.8%
Cola	70.0%
Lemon-Lime	13.6%

*Small sample size distorts analysis

EAST CENTRAL REGION

Plants Reporting: 46

SALES FROM PREVIOUS YEAR

Gallonage +2.2%

Units +1.0%

0.9%

Packaged +2.6%

Dollar Value +10.0%

INCREASE

DECREASE

Package Type:

Pre-Mix	0.3%
Post-Mix	0.9%
Plastic	+3.6%
Cans	4.2%
Refillable Glass	+2.8%
One-Way Glass	+36.0%

GLASS CONTAINER SIZE	ONE-WAY	REFILLABLE
6.9 oz	+2.5%	26.8%
10-12 oz	14.2%	15.3%
16 oz	+71.0%	+6.8%
24-32 oz. 1 liter	25.7%	20.2%
48-64 oz. 2 liter	+36.3%	—

MARKET SHARES

BULK

PACKAGED

PACKAGED 88.0%

BULK 12.0%

Pre-Mix 9.9%

Post-Mix 90.1%

Plastic 13.1%

Cans 34.8%

One-Way 8.3%

Refillable 47.7%

ONE-WAY GLASS

24-32 oz. 1 liter 2.7%

48-64 oz. 2 liter 10.3%

6.9 oz 0.1%

16 oz 67.1%

10-12 oz 19.8%

REFILLABLE GLASS

16 oz. 87.2%

24-32 oz. 1 liter 5.8%

6.9 oz 0.6%

10-12 oz 6.4%

DISTRIBUTION

Food Stores 60.8%

Other Retail Outlets 22.6%

Vending Machines 16.6%

FLAVOR MIX FOR PACKAGED

(Figures for individual flavors are subject to sampling distortions.)

REGULAR SOFT DRINKS 86.0%	
Cola	67.7%
Lemon-Lime	6.7%
Orange	4.2%
DIET SOFT DRINKS 14.0%	
Cola	74.1%
Lemon-Lime	10.4%

WEST CENTRAL REGION

Plants Reporting: 39

Iowa
Kansas
Minnesota
Missouri
Nebraska
North Dakota
South Dakota

SALES FROM PREVIOUS YEAR

Gallonage +2.3%

Units +9.7%

Bulk +5.6%

Packaged +2.0%

Dollar Value +7.5%

Package Type	
Pre-Mix	+8.2%
Post-Mix	+0.9%
Plastic	+31.5%
Cans	-4.8%
ReUsable Glass	+0.9%
One-Way Glass	+13.9%

GLASS CONTAINER SIZE	ONE-WAY	REFILLABLE
6-9 oz	*	-27.2%
10-12 oz	-12.6%	-12.4%
16 oz	+99.8%	+16.5%
24-32 oz /1 liter	-35.2%	-34.2%
48-64 oz /2 liter	-26.5%	-89.4%

MARKET SHARES

PACKAGED 91.5%

—BULK 8.5%

BULK

Pre-Mix 34.6%

Post-Mix 65.4%

PACKAGED

Plastic 13.5%

Cans 46.7%

One-Ways 6.3%

Refillables 33.4%

ONE-WAY GLASS

24-32 oz /1 liter 18.5%

48-64 oz /2 liter 1.9%

16 oz 53.4%

10-12 oz 26.1%

REFILLABLE GLASS

16 oz 67.9%

24-32 oz /1 liter 9.1%

48-64 oz /2 liter 0.1%

6-9 oz 0.3%

10-12 oz 22.6%

DISTRIBUTION

Food Stores 59.5%

Other Retail Outlets 24.0%

Vending Machines 16.5%

FLAVOR MIX FOR PACKAGED

(Figures for individual flavors are subject to sampling distortions.)

REGULAR SOFT DRINKS 82.9%	
Cola	53.6%
Lemon-Lime	15.6%
Pepper-type	7.3%
DIET SOFT DRINKS 17.1%	
Cola	56.3%
Lemon-Lime	17.6%

*Small sample size; distorts analysis

SOUTHWESTERN REGION

Plants Reporting: 30

Arizona
New Mexico
Oklahoma
Texas

SALES FROM PREVIOUS YEAR

Gallonage +9.2%

Units +9.0%

Bulk +5.9%

Packaged +9.5%

Dollar Value +21.5%

Package Type

Pre-Mix	+5.3%
Post-Mix	+6.0%
Plastic	+13.8%
Cans	+14.4%
Refillable Glass	-19.4%
One-Way Glass	+42.0%

GLASS CONTAINER SIZE	ONE-WAY	REFILLABLE
6-9 oz	-75.5%	-6.9%
10-12 oz	+11.4%	-11.4%
16 oz	+61.4%	-49.4%
24-32 oz /1 liter	+12.7%	-13.5%
48-64 oz /2 liter	-61.1%	—

MARKET SHARES

PACKAGED 91.7%

BULK 8.3%

BULK: Post-Mix 89.4%, Pre-Mix 10.6%

PACKAGED: One-Ways 18.6%, Plastic 22.5%, Refillables 19.0%, Cans 39.9%

ONE-WAY GLASS

16 oz 75.2%

24-32 oz /1 liter 7.4%

48-64 oz /2 liter 0.9%

10-12 oz 16.5%

REFILLABLE GLASS

24-32 oz /1 liter 61.0%

6.9 oz 1.8%

10-12 oz 25.8%

16 oz 11.4%

DISTRIBUTION

Food Stores 58.0%

Other Retail Outlets 22.5%

Vending Machines 19.5%

FLAVOR MIX FOR PACKAGED

(Figures for individual flavors are subject to sampling distortions.)

REGULAR SOFT DRINKS 86.8%	
Cola	55.0%
Lemon-Lime	10.5%
Pepper-type	17.2%
DIET SOFT DRINKS 13.2%	
Cola	45.6%
Lemon-Lime	12.2%

WESTERN REGION

Plants Reporting: 15

Colorado
Idaho
Montana
Nevada
Utah
Wyoming

SALES FROM PREVIOUS YEAR

Gallonage	+9.9%	**INCREASE**
Units	+9.4%	**DECREASE**
−2.0%		
Packaged	+12.6%	
Dollar Value	+17.2%	

Package Type

Pre-Mix	−1.5%
Post-Mix	−3.7%
Plastic	+24.5%
Cans	+16.1%
Refillable Glass	−14.4%
One-Way Glass	+76.5%

GLASS CONTAINER SIZE	ONE-WAY	REFILLABLE
6-9 oz.	—	−52.3%
10-12 oz.	+36.6%	−15.9%
16 oz.	+156.8%	−3.8%
24-32 oz./1 liter	*	−31.1%
48-64 oz./2 liter	—	—

MARKET SHARES

PACKAGED: 83.4%

—BULK: 16.6%

BULK

Pre-Mix 24.2%

Post-Mix 75.8%

PACKAGED

One-Ways 5.6%

Plastic 10.3%

Refillables 16.1%

Cans 67.9%

ONE-WAY GLASS

16 oz. 67.7%

24-32 oz./1 liter 2.8%

10-12 oz. 29.5%

REFILLABLE GLASS

24-32 oz./1 liter 24.4%

16 oz. 48.8%

48-64 oz./2 liter 1.0%

6-9 oz. 0.1%

10-12 oz. 25.7%

DISTRIBUTION

Food Stores 56.4%

Other Retail Outlets 16.0%

Vending Machines 27.7%

FLAVOR MIX FOR PACKAGED

(Figures for individual flavors are subject to sampling distortions.)

REGULAR SOFT DRINKS	**88.4%**
Cola	54.3%
Lemon-Lime	13.4%
Pepper-type	7.1%
Orange	5.9%
DIET SOFT DRINKS	**11.6%**
Cola	70.6%
Lemon-Lime	8.8%

***Small sample size distorts analysis**

PACIFIC REGION

Plants Reporting: 33

Alaska
California
Hawaii
Oregon
Washington

SALES FROM PREVIOUS YEAR

Gallonage +1.9%

Units +1.8%

Bulk +17.7%

Packaged +0.8%

Dollar Value +24.5%

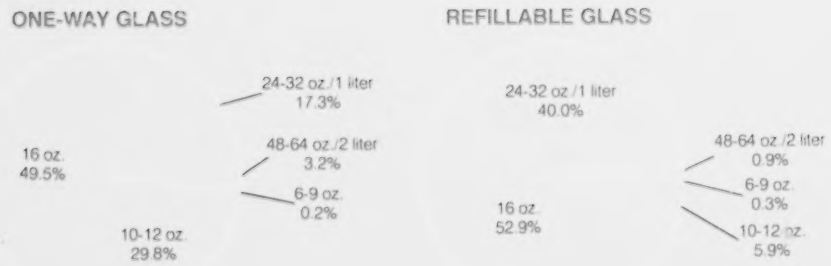
Package Type

Pre-Mix	+4.9%
Post-Mix	+20.2%
Plastic	+18.5%
Cans	+1.9%
Refillable Glass	−7.0%
One-Way Glass	−16.4%

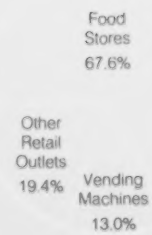
GLASS CONTAINER SIZE	ONE-WAY	REFILLABLE
6-9 oz.	—	−25.5%
10-12 oz.	−8.2%	−15.9%
16 oz.	+21.4%	−5.7%
24-32 oz./1 liter	−36.2%	−7.5%
48-64 oz./2 liter	−83.1%	+14.4%

MARKET SHARES

*SUBJECT TO SAMPLING ERROR



DISTRIBUTION



FLAVOR MIX FOR PACKAGED

(Figures for individual flavors are subject to sampling distortions.)

REGULAR SOFT DRINKS	78.8%
Cola	50.0%
Lemon-Lime	16.1%
Orange	6.1%
DIET SOFT DRINKS	21.2%
Cola	60.8%
Lemon-Lime	14.6%

ESTIMATED ANNUAL PRODUCTION AND CONSUMPTION OF SOFT DRINKS

Year	Total Value $ (Wholesale)	Total Cases (288 ounce)	Per capita (12 oz containers)
1849	760,000	1.1	
1859	1,415,000	1,886,700	1.5
1869	4,222,000	5,629,300	4.3
1879	4,742,000	6,322,700	3.0
1889	14,354,000	17,398,800	6.6
1899	23,269,000	28,854,450	8.1
1909	43,508,000	41,436,200	10.8
1919	135,341,000	112,784,100	25.6
1929	214,322,238	181,618,990	35.4
1939	361,690,917	321,997,120	59.1
1945	584,994,000	487,495,000	88.6
1946	617,168,600	514,307,200	88.2
1947	745,676,000	601,109,300	100.6
1948	835,157,300	673,242,500	109.6
1949	860,959,300	675,262,200	108.0
1950	876,532,600	667,834,300	105.3
1951	939,442,500	695,883,300	108.5
1952	1,019,295,000	755,033,300	116.0
1953	1,089,513,000	785,234,700	118.3
1954	1,166,605,000	784,449,300	116.1
1955	1,252,276,000	843,283,300	122.8
1956	1,308,000,000	880,809,300	125.9
1957	1,347,241,500	907,233,300	126.1
1958	1,427,463,500	906,326,000	124.3
1959	1,633,015,900	989,706,700	133.2
1960	1,698,025,600	984,362,700	128.0
1961	1,829,083,200	1,016,157,300	132.2
1962	2,001,016,800	1,111,676,000	142.3
1963	2,341,189,000	1,200,601,000	151.6
1964	2,533,167,000	1,299,060,000	161.9
1965	2,735,567,000	1,402,854,700	172.7
1966	3,175,980,000	1,568,391,300	191.3
1967	3,458,632,000	1,646,968,000	198.7
1968	4,165,552,000	1,851,356,700	221.1
1969	4,369,664,000	1,942,073,300	229.6
1970	4,799,784,000	2,064,423,300	241.9
1971	5,346,960,000	2,235,743,300	258.7
1972	5,683,820,000	2,360,944,700	270.9
1973	6,223,156,500	2,514,406,700	286.4
1974	7,827,131,000	2,532,007,300	286.3
1975	9,397,797,600	2,610,499,300	292.7
1976	10,375,167,000	2,952,474,700	328.7
1977	11,526,810,000	3,247,722,000	359.0
1978	13,344,588,000	3,490,000,000	382.7
1979	14,972,628,000	3,664,500,000	399.6
1980	17,676,648,000	3,816,575,000	409.6
1981	20,015,269,000	3,959,697,000	412.3

Note: 1981 Resident Population was 230,508,000 according to the U.S. Dept. of Commerce, Bureau of the Census, based on revised census report. For purposes of the report, all soft drink sales are converted to gallons and expressed in cases of 24 twelve-ounce containers. Prior to 1977 the standard case was 24 eight-ounce containers. This change was made to more accurately reflect the average size container.

GLOSSARY OF TERMS

Bulk: Consists of "fountain" soft drink dispensed in two forms: Post-Mix and Pre-Mix.

Post-Mix: Finished soft drink syrup which is mixed with carbonated water at the dispensing stage.

Pre-Mix: Finished soft drink beverage dispensed from a 5-gallon cylinder.

Packaged: Those soft drinks which are distributed in cans, plastic bottles, disposable glass, or refillable glass.

Gallonage: Refers to fluid volume of soft drinks sold.

Units: Refers to number of containers (both bulk and packaged) of soft drinks sold. (Note: Gallonage and unit increases may differ because fewer containers or servings of soft drinks are purchased, but are purchased in larger volume *per container*.)

Dollar Value: For the purposes of the Sales Survey, dollar value refers to the wholesale value of the product manufactured or distributed. The Association does not have any retail figures for soft drinks.

Plastic: Refers to polyethylene terephthalate (PET) beverage containers. This package is a one-way container, but should not be considered as part of the one-way *glass* category.

Per Capita Consumption: A *statistical measurement* of consumption arrived at by dividing the total volume of soft drink sales by the population of the United States.

Other Retail Stores: When discussing soft drink distribution, this term refers to outlets other than food stores (convenience stores are considered food stores) such as drug stores, general merchandise stores, etc.

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